SiteManager Training Manual

Module A
Chapter 2

Contract Administration
Contract Records
Milestones

**Section A-2-2-2**

Viewing Milestone Information

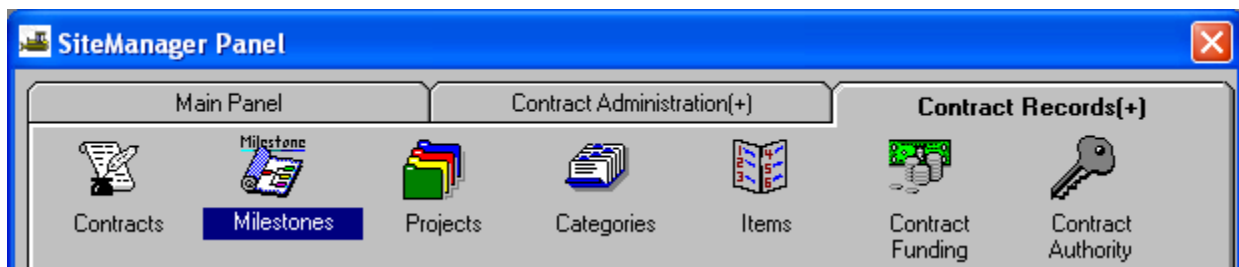This page intentionally left blank

Viewing Contract Milestones

The definition of a Milestone is any event that is time and monetary dependent. There is three types of milestones available in SiteManager: Calendar Day, Fixed Completion Date and Work Days.
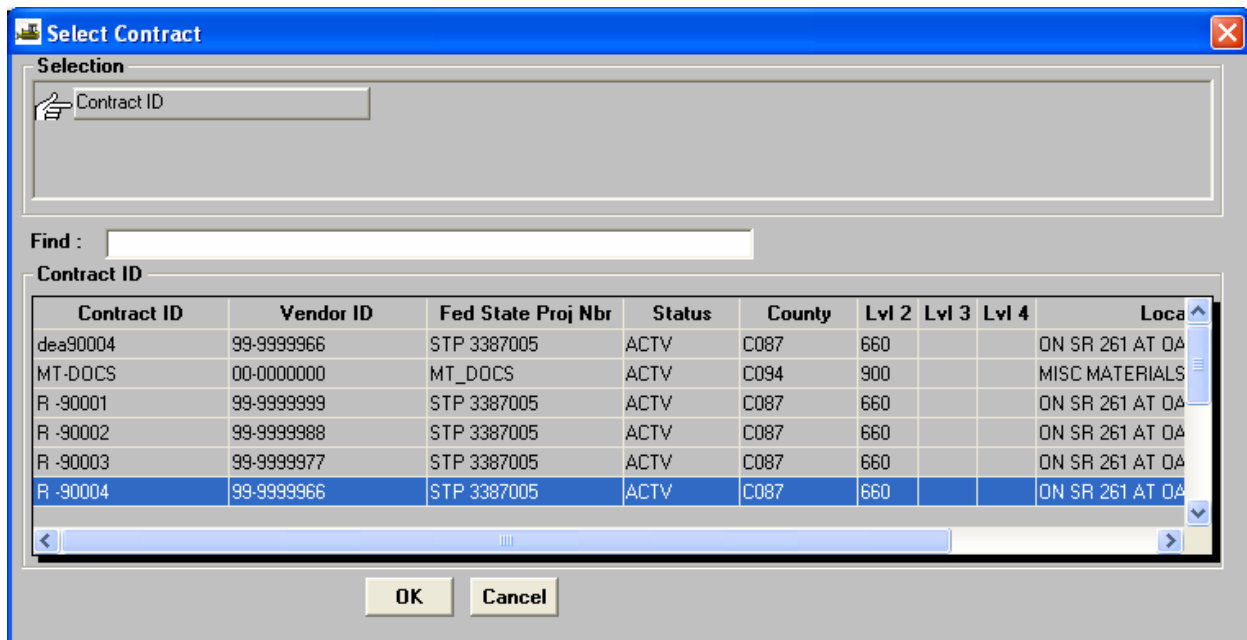

"Double-click" on **Contract Administration**(+) located on the Main Panel.
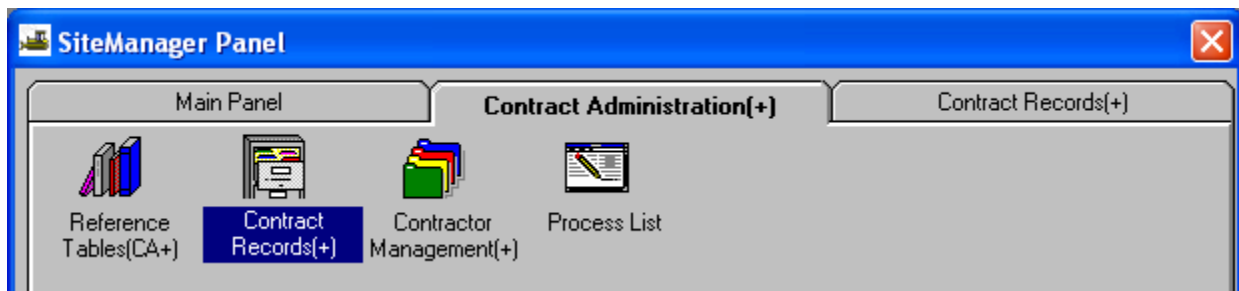
"Double-click" on **Contract Records(+)**.


"Double-click" on **Milestones**.

The **Select Contract** panel opens.

The bottom panel contains columns for:

- **Contract ID:** this is the identification number assigned to the contract.
- **Vendor ID:** this is the INDOT assigned number identifying the Prime Contractor.
- **Fed State Proj Nbr:** this is the assigned Federal or State Project Number.
- **Status:** this field indicates the current status of the contract, i.e. Pending, Active, Complete, Archived.
- **County:** this field contains a letter and number code identifying the county where the majority of the work is located.
- **Lvl 2:** this column indicates the District office administering the contract.
- **Lvl 3:** this column is not utilized by INDOT.
- **Lvl 4:** this column is not utilized by INDOT.
- **Location Description 1:** this column is the description of the physical limits of the contract.

Use the Scroll or Find, Filter, Sort technique to locate the appropriate contract. "Double-click" on the contract.
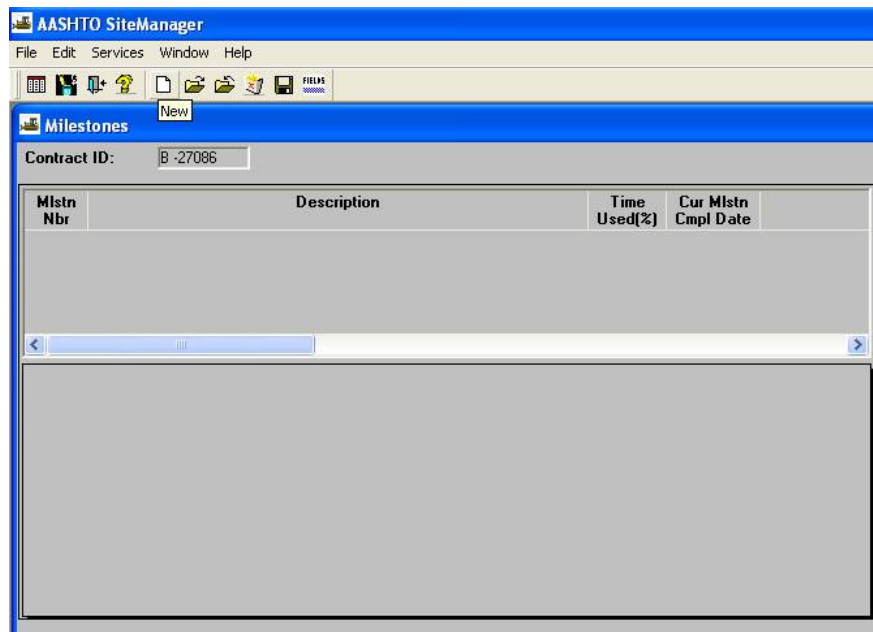
If no Milestones exist for the contract, none will show in the top panel.
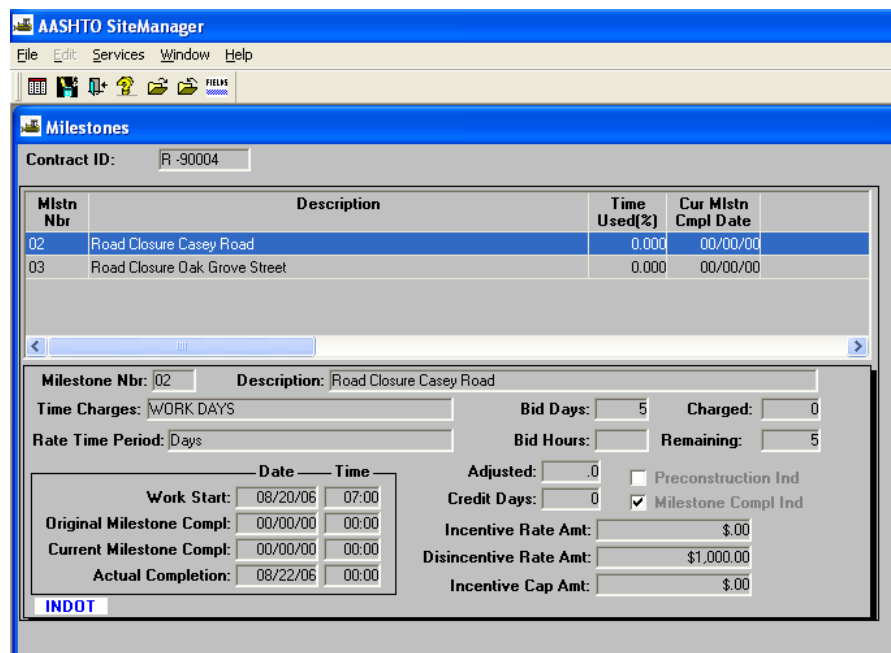
If a Milestone already exists for the contract, it will be listed in the top panel. The information for an individual Milestone is located in the bottom panel. "Click" on the appropriate description to view.

Milestone Nbr: Milestone Nbr field is the sequential number associated to the milestone.

Description: Description field is the name of the Milestone.

Time Charges: **Time Charges** field is how time is assessed for the contract. This will be either: Fixed Completion Date, Work Days or Calendar Days.

Rate Time Period: Rate Time Period is used to calculate the incentive or disincentive for the Milestone by Days or Hours.

Bid Days: Bid Days is the original number of days bid for the milestone. This field is required if the **Time Charges** value is **Work Days** or **Calendar Days** and the **Rate Time Period** value is **Days**. A value can not be entered if the **Time Charges** value is **Fixed Completion Date**

Charged: The **Charged** field indicates the total number of days charged to the particular milestone, this information is obtained from the Daily Diary.

Bid Hours: Bid Hours is the original number of hours for the milestone. This field is required if the **Time Charges** value is **Work Days** or **Calendar Days** and the **Rate Time Period** value is **Hours**. The **Bid Hours** value must be evenly divisible by 12. A value can not be entered if the **Time Charges** value is **Fixed Completion Date**.

Remaining: The **Remaining** field indicates the total number of days left to complete the particular milestone.

Work Start: Work Start is the time the milestone work is expected to begin.

Original Milestone Compl: Original Milestone Completion is the original date and time the milestone is to be completed. If the **Time Charges** entry is:

- **Calendar Days**, the system automatically calculates this value when the **Work Start Date** and **Bid Days** are entered.

- **Fixed Completion Date**: is the original date in the **Date** field and then the original start time in the **Time** field that the original milestone is to be completed.

- **Work Days** has no value for **Original Milestone Compl** date and time fields.

Current Milestone Compl: Current Milestone Compl is the current expected date and time of completion. For the **Date** field the system automatically calculates this value. The Change Order function enters this date when time adjustments for milestones are approved. For new milestones, this field defaults to the milestone's original completion date. The **Time** field is the current expected time of completion. This is always calculated from the **Work Start Time** if the **Time Charges** entry is **Work Days** or **Calendar Days** (Work Start Time + Hours).

Preconstruction Ind: Preconstruction Indicator indicates that the data was entered from a Pre-construction system, (TRNS*port) and can not be modified.

Milestone Compl Ind: Milestone Completion Indicator indicates that the Milestone work is completed. This field is checked ON automatically when the User enters the actual completion date. When this indicator is checked, all fields are protected

Incentive Rate Amt: Incentive Rate Amount is the rate in dollars paid to the Contractor if the milestone work has progressed beyond expectations.

Disincentive Rate Amt: Disincentive Rate Amount is the rate in dollars the Contractor is to be penalized if the milestone work has not progressed to expectations.

Incentive Cap Amt: Incentive Cap Amount is the maximum dollar amount allowed for this milestone.

"Click" the **Save** button on the toolbar.

A-2-2-2 Group Exercise

Look up the status of milestones on an active contract.

Login   inquire
Password   pass

"Click" on **Contract Administration (+)**
"Click" on **Contract Records (+)**
"Click" on **Milestones**

"Double-click" on Contract No. R-90001
"Click" on Milestone #02 "Fuquay Road Closure"

What is the Disincentive Rate for this Milestone?

"Click" **Close** to exit.